

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment						Work Assignment Number 1-7				
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:				
Contract Number EP-D-14-001		Contract Period 01/01/2014 To 12/31/2014 Base <input checked="" type="checkbox"/> Option Period Number			Title of Work Assignment/SF Site Name Healthy School Environments					
Contractor SCIENTIFIC CONSULTING GROUP, INC, THE				Specify Section and paragraph of Contract SOW						
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval						Period of Performance From 01/01/2014 To 12/31/2014				
Comments: The purpose of this work assignment is to accelerate progress on healthy school environments and build a sustainable infrastructure to support national progress over the long-term. This WA includes 250 hours to prepare the work plan and begin work. To the best of our knowledge, this work does not duplicate any work previously performed, or currently being performed by this office										
<input type="checkbox"/> Superfund				Accounting and Appropriations Data				<input checked="" type="checkbox"/> Non-Superfund		
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE: 0				
01/01/2014 To 12/31/2014										
This Action:						250				
						250				
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:				Cost/Fee:		LOE:				
Cumulative Approved:				Cost/Fee:		LOE:				
Work Assignment Manager Name Jennifer Lemon						Branch/Mail Code:				
						Phone Number 202-343-9608				
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Project Officer Name Annette Johnson						Branch/Mail Code:				
						Phone Number: 202-343-9489				
						FAX Number:				
Other Agency Official Name						Branch/Mail Code:				
						Phone Number:				
						FAX Number:				
Contracting Official Name Antonio L. Leathers						Branch/Mail Code:				
						Phone Number: 919-541-2312				
						FAX Number:				

DATE:

WORK ASSIGNMENT

CONTRACTOR: Scientific Consulting Group, Inc. (SCG)
CONTRACT NUMBER: EP-D-14-001

WORK ASSIGNMENT NO:

WORK ASSIGNMENT TITLE: Healthy School Environments Initiative Support

WORK ASSIGNMENT

MANAGER: Name: Jennifer Lemon
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ALTERNATE WORK

ASSIGNMENT MANAGER: Name: Michele Curreri
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LEVEL OF EFFORT: Hours

PERIOD OF PERFORMANCE: January 1, 2014 - December 31, 2014

In meeting the requirements of this work assignment, the Contractor shall be in a support role and will NOT be involved in the development of EPA policy, nor in any other activity that is an "Inherently Governmental function."

I. BACKGROUND

One-fifth of the U.S. population, or 55 million students and 7 million teachers, administrators and staff members occupy 125,000 public and private K-12 schools every day.¹ Of these schools, about 97,000 are the responsibility of 16,000 public school districts; the remaining 28,000 schools are private schools. Schools are heavily used facilities with indoor environments that have the potential to impact occupants' health, productivity and performance.

¹ These figures are from EPA's *IAQ Tools for Schools Communications Guide* and have been updated with the U.S. Census' Back to School 2006-2007 information, which can be found at www.census.gov/PressRelease/www/releases/archives/facts_for_features_special_editions/007108.html.

The *IAQ Tools for Schools* guidance equips schools to provide healthy indoor environments and has a strong track record of setting and achieving consistent, outstanding results. According to the 2012 National School Health Policies and Practices Study (SHPPS) conducted by the Centers for Disease Control and Prevention, the percentage of school districts with an IAQ management program increased from 35.4 percent in 2006 to 47.4 percent in 2012. Among the school districts with an IAQ management program, 82.3 percent are based on *IAQ Tools for Schools* guidance. We estimate that 43,000 schools across the country have adopted effective IAQ plans to date.

EPA promotes the rapid spread of best practices in school districts nationwide through the dissemination of the *IAQ Tools for Schools* Action Kit, management of the national *IAQ Tools for Schools* Network of school districts, nonprofit organizations, local, state and federal government agencies, and community-based organizations, and coordination of the School Health and Indoor Environments Leadership Development (SHIELD) Network.

EPA relies on three platforms — knowledge of best practices shared by network members in an action learning system — which is referred to as the “*IAQ Tools for Schools* Connector” — to promote effective, sustainable IAQ management programs in schools. These platforms provide a foundation of success which EPA can leverage to promote a holistic focus on healthy school environments.

This work will be completed in accordance with the Information Quality Act/Information Quality Guidelines, and the Environmental Protection Agency's peer review guidance, as required. The links to these guidelines are: <http://www.epa.gov/quality/> and <http://www.epa.gov/quality/informationguidelines/index.html>.

II. PURPOSE

EPA's Indoor Environments Division (IED) Healthy Schools annual goal is for 1,000 schools to newly adopt effective IAQ management plans consistent with *Indoor Air Quality Tools for Schools* guidance. In order for EPA to achieve this goal we will need to assist school districts to move along a continuum from no action to those with effective IAQ management programs to those with sustainable environmental health and safety programs. Using the powerful assets of the national *IAQ Tools for Schools* Network, EPA wants to achieve three main goals in FY 2014:

1. **Fill Critical gaps in technical tools, guidance and standards.**
IED will publish and promote guidance connecting energy efficiency and healthy school indoor environments and use effective web technologies to promote proven *IAQ Tools for Schools* technical guidance and tools.
2. **Mobilize school leaders into a Leadership Network to advance progress on healthy school indoor environments nationwide.**
IED will work in collaboration with our EPA Regional Indoor Environments colleagues to engage other EPA offices with school-related programs, school district champions,

NGOs, states, industry and other school-based stakeholders to spur action, obtain results, and share accountability for the vision of creating holistic, healthy school environments nationwide through the School Health and Indoor Environments Leadership Development (SHIELD) Network.

3. Continue to increase awareness of, and the demand for, healthy school environments.

Through existing and new low-cost communication channels (e.g., email discussion list, webinars and technical email communications, etc.), IED will use its broad reach through the national *IAQ Tools for Schools* Network to continue to promote strategies for creating healthy indoor environments in schools and expanding the discourse to a broader healthy community.

Key Actions to Achieve Results

Through work completed under this work assignment, EPA will accomplish these goals through the following near-term actions:

- Continue to actively engage the national *IAQ Tools for Schools* Network by inspiring and equipping the diverse and committed group of stakeholders to expand their leadership role in the national healthy school environments effort.
- Enhance the existing evidence-based Framework and communications channels to accelerate progress on addressing school environments holistically.
- Improve access to proven tools and guidance for successfully managing school indoor environments using cost-effective technologies.

Taken together, these actions will accelerate progress on healthy school environments and build a sustainable infrastructure to support national progress over the long-term. This work assignment will assist in deploying a *system* that produces results. EPA realizes that it takes a team approach for a school district to successfully adopt an IAQ management program. The team most often includes school facility managers, school board members, superintendents, teachers, nurses, parents, school business officials, community advocates, etc. Hence, different outreach and education approaches will need to be utilized for each target area in order to successfully engage these groups around the importance of effective IAQ management in schools.

III. SCOPE OF WORK

Task 1: Prepare Work Plan and Cost Proposal

The work plan and cost proposal shall be submitted to the EPA Work Assignment Manager (EPA WAM), Project Officer, and Contracting Officer within 20 calendar days of the receipt of the approved work assignment. The work plan shall demonstrate the contractor's technical approach for accomplishing the scope of work described in this work assignment. The cost proposal shall detail the contractor's fiscal approach for accomplishing the work assignment with

estimated labor hours, relevant other direct costs (ODC's), and be organized on a task by task basis. Estimates in the cost proposal shall include travel and disposable equipment costs necessary to implement the program. No work shall begin on this work assignment prior to the approval of the cost estimate unless a technical direction is received from the EPA WAM.

Deliverables:

- 1.1** The contractor shall prepare and submit a cost proposal within 15 calendar days of the effective date of the approved work assignment.

Task 2: Guidance and Technical Meeting with EPA WAM.

Applicable sections of the Contract Statement of Work include: F(2)(a&c).

The Contractor and the Deputy Project Manager shall meet with the EPA WAM to discuss particulars concerning the work assignment within 5 working days of the effective date of this work assignment.

Subsequently, the contractor shall meet with the EPA WAM on a monthly basis to receive EPA guidance and discuss issues regarding all tasks indicated. The times and dates for the monthly meetings shall be determined by EPA WAM through technical direction. Meeting agendas will be finalized at the start of each meeting and will include agenda items from EPA WAM and the contractor. The EPA WAM and the contractor will hold meetings either in the contractor's office or at the EPA WAM's office (Washington, DC).

Deliverables:

- 2.1** The contractor shall attend monthly meetings and provide detailed meeting notes to the EPA WAM within 5 working days of each monthly meeting.

Task 3: Product Development

Applicable sections of the Contract Statement of Work include: D(2)(a-q), F(a).

- 3.1** When requested by the EPA WAM through technical direction, the contractor shall develop education and outreach materials (e.g., slides, fact sheets, articles, brochures, case studies, e-bulletins, posters, guidance documents, web site content) about the importance of comprehensive IAQ management. Final product deliverables will include EPA WAM input and review. The contractor shall develop no more than 40 documents, with specifics to be given by the EPA WAM through technical direction. All final print products shall be delivered on CD-ROM disks, with appropriate printing forms needed for EPA printing process and Web-ready (HTML) requirements.

When requested by the EPA WAM through technical direction, the contractor shall also revise existing draft and final products that are associated with the *Indoor Air Quality Tools for Schools* guidance and national network.

Deliverables:

3.1.a. Within 20 working days of receipt of technical direction from the EPA WAM, the contractor shall develop first draft of materials. The EPA WAM will provide comments within 10 working days.

3.1.b. The contractor shall incorporate EPA WAM's comments and deliver 2nd draft within 10 working days. EPA WAM will provide comments within 10 working days.

3.1.c The contractor shall incorporate EPA WAM's comments and submit final materials within 10 working days.

3.2 Upon receipt of technical direction, the contractor shall develop and implement a marketing and outreach strategy for products. EPA's goal is to ensure that the Agency is effectively delivering messages designed for its target audiences. As well, it will provide an opportunity to gather feedback on the usefulness and effectiveness of the products. The marketing and outreach strategy should address three main components:

- 1) Determining outlets for dissemination by identifying target audiences, third party promoters, and venues in which these documents can be distributed.
- 2) Developing marketing/promotional materials (if necessary) to assist with placement of products (e.g., fact sheets and promotional blurbs).
- 3) Tracking placement and effectiveness of resources by tracking where people are learning about the products and whether they are reacting by ordering them.

3.3 Deliverables:

3.2a. The contractor shall submit a draft strategy to the EPA WAM within 15 days after technical direction is provided.

3.2.b The contractor shall incorporate EPA WAM's comments and submit a final strategy to EPA WAM within 10 working days after receipt of EPA comments.

3.2.c Upon EPA approval of the final strategy, the contractor will begin implementing the strategy.

Task 4:

Provide Support for Designated School Mentors

Applicable sections of the Contract Statement of Work include: C(2)(a-e), D(2)(a-m),(o-q), F(2)(a).

For purposes of this work assignment, the term “mentors” refers to all EPA-designated individuals who are part of the national school network that support schools and school districts in their efforts to manage and sustain comprehensive IAQ management programs. Also, for purposes of this work assignment, the contractor shall use the official EPA definition of *Indoor Air Quality Tools for Schools* implementation (as provided by the EPA WAM) which is grounded in the six key drivers (Organize, Assess, Plan, Act, Evaluate, and Communicate).

Designated mentors may include past Excellence Award, Model of Sustained Excellence, and Connector award winners, “Faculty” school districts, and Design Challenge schools. The mentors will provide insight and first-hand examples of successful IAQ management programs adopted by districts. Through their actions and wide-ranging program management, these particular IAQ management programs have flourished, provided measurable outcomes and results, and have established protocols that ensure their sustainability.

4.1 Coordinate Outreach and Communications with School Mentors

As specified through technical direction, the contractor shall assist EPA with coordinating conference calls, on-site visits, or webinars with the mentors. The goal of these communication efforts is to “coach” and prepare the mentors to represent specific indoor environmental quality initiatives, barriers challenges overcome, and other factors which EPA determines through the course of this initiative.

Deliverables:

4.1 The contractor shall track and provide updated information about planned correspondence or engagements with designated school district programs and other mentoring activities. The Contractor shall provide a weekly status update regarding planned events with these mentors.

Task 5: *IAQ Tools for Schools* Action Learning Network Support

Applicable sections of the Contract Statement of Work include: C(2)(a-e), D(2)(a-m),(o-q), F(2)(a-c).

The *IAQ Schools Connector* serves as the communication hub of the *Indoor Air Quality Tools for Schools* Network, offering dynamic, interactive resources, communication tools, and peer networks that will be leveraged to launch, reinvigorate, and sustain an IAQ management program in schools across the country. EPA wants participants to connect with their peers — from those new to IAQ management to committed leaders and champions whose vast experience continually redefine success — to share knowledge and learn how to build a cohesive IAQ management plan using the matrix of the *Framework for Effective School IAQ Management* and the tools of the *Indoor Air Quality Tools for Schools* Action Kit

EPA’s goal is to encourage school stakeholders to “join” this network and learn, interact, and collaborate throughout the year. This will be accomplished through the following communication methods:

- **Dynamic email discussion forum.** This forum will be managed through EPA's on-line Lyrus system. Participants will have the ability to post questions and discuss hot topics in the world of school IAQ management.
- **Informative e-mail communications.** Healthy School Indoor Environments *Updates* and e-mails highlighting special events and opportunities will keep network participants informed of the latest information and resources related to IAQ in schools. Users can contribute their 'stories from the field' to share what is happening in other school districts, state programs, and organizations, and learn what others are doing to achieve excellence in IAQ management.
- **Interactive Webinars.** EPA will encourage school stakeholders to participate in on-line, live presentations. Information will be presented about the latest emerging issues in IAQ while allowing participants to share their experiences and expertise and have their questions answered in real-time. EPA plans to conduct webinars approximately one per quarter throughout the period of performance for this work assignment.

Deliverables:

5.1 Within 5 working days of receipt of technical direction from the EPA WAM, the contractor shall support and manage the email discussion forum as an approved reviewer through the Lyrus system. This involves posting, tracking, and reporting on the number of members and those who chose to unsubscribe.

5.2 Within 5 working days of receipt of technical direction from the EPA WAM, the contractor shall assist EPA with developing and disseminating technical email communications through the HighRoad system. The Contractor shall provide regular updates on the number of contacts in the IAQ Schools Network database and track the analytics linked to the open rates, forwards, and click rates associated with the various email campaigns.

5.3 Within 5 working days of receipt of technical direction from the EPA WAM, the contractor shall draft promotional information about an upcoming webinar, provide a communications strategy for marketing the webinar event, and establish dry run events for the webinar (which may include slide templates for other external speakers). The contractor shall utilize a webinar system similar to that of the "Go To Meeting" platform, that has the capabilities of tracking registrants, posing registration questions, polling during the webinar, and voice-over IP capabilities so users can access the webinar without a phone line.

5.4 Within 10 working days of receipt of technical direction from the EPA WAM, the contractor shall begin to develop draft outreach strategies for each communication method referred to above. Each strategy will include a timeline for when information will be "pushed" using each method, and future campaigns/outreach related to each method of communication. The EPA WAM will be responsible for approving text or materials associated with each communication method or pacing event.

Task 6: IAQ Tools for Schools Meeting Support

Applicable sections of the Contract Statement of Work include: C(2)(a-e), D(2)(a-m),(o-q), F(2)(a).

6.1 Participation in Schools Conferences

Upon receipt of technical direction the contractor shall arrange for participation in national, state, or local conferences. Participation shall include booth display and/or session presentation. The contractor shall provide all logistical assistance including procuring booth space, a/v equipment and attending conference. The contractor shall deliver a trip/conference report upon return from each conference.

Through technical direction from EPA WAM all logistical information regarding the conferences will be provided to the contractor. For purposes of this work assignment, the contractor shall assume 4 conferences will be attended.

Upon receipt of technical direction the contractor shall assist with the development of meeting agendas, marketing materials, technical presentations, education materials, select expert speakers and provide assistance with meeting registration, facilitation and provide on-site logistical support.

6.2 Securing Expert Speakers for IAQ-Related Pacing Events and Conferences

Upon receipt of technical direction, the contractor shall arrange for expert speakers on IAQ issues to attend and participate in conferences, meetings, trainings, workshops, and other EPA-designated pacing events. The IAQ management experts would participate in an expert role by presenting at sessions. For purposes of budget development the contractor shall anticipate no more than 10 experts to participate in conferences, trainings, and pacing events.

6.3 Engaging in Post-Event Follow-up Activities

Per technical direction, the contractor shall provide follow-up assistance to EPA concerning the designated events. Follow-up activities may include, but are not limited to, email campaigns, phone calls, or mailing of materials requested from an event.

Deliverables:

- 6.1 Within 10 working days of receipt of technical direction from the EPA WAM, the contractor shall begin to make and deliver logistical arrangements for EPA participation in conferences/IAQ events.**
- 6.2 Within 5 working days of receipt of technical direction from the EPA WAM, the contractor shall make necessary arrangements for expert speakers to attend and participate in IAQ-focused meetings, conferences and/or trainings. Within 10 working days of expert speaker participation in event, etc. the contractor shall deliver a report outlining expert speaker's role and presentation/handouts.**

- 6.3 Within 5 working days of receipt of technical direction from the EPA WAM, the contractor shall provide a list of recommended follow-up activities as part of the post-event action items. This draft shall include draft text for email campaigns and any other recommended follow-up activities that may need to be addressed by the EPA WAM.

Task 7: Evaluation and Analytics of the *Indoor Air Quality Tools for Schools* Guidance, Resources and Brand

Applicable sections of the Contract Statement of Work include: D(2)(a-q).

IED promotes the adoption of good IAQ management practices in schools throughout the United States through the use of programmatic, technical and communications guidance.

The contractor shall perform analytics and evaluation on the outreach and communication activities conducted under this work assignment. The evaluation/analytics shall provide data on the number of schools contacts, Listserv subscribers and marketing/technical emails.

Additionally, the contractor shall evaluate the following:

- 1) Overall effectiveness of the Action Kit, Framework, Action Learning Network (i.e., IAQ Connector, email campaigns, and revised *IAQ Tools for Schools* web site), opportunities and other supporting efforts, such as regional pacing events.
- 2) General communication and technical assistance needs of participating school districts (e.g., webinars, e-mails, and the email discussion forum).
- 3) Recommended strategies to encourage non-participating schools to make commitments for adopting comprehensive IAQ management plans.

Deliverables:

- 7.1 The contractor shall deliver a quarterly report including analytics information gathered from the current email system distribution method (i.e., HighRoad) including number of contacts that received the email, bounce back rates, number of email opens, unique opens and opt outs. In addition, analytics related to web site visits and downloads for specific resources and documents will need to be tracked and reported.

Task 8: Supporting School Health and Indoor Environments Leadership Development (SHIELD) Network and Summit

Applicable sections of the Contract Statement of Work include: C(2)(a-e), D(2)(a-m),(o-q), F(2)(a).

The U.S. EPA Indoor Environments Division is gathering the top leaders in the green and healthy schools movement to discuss and accelerate progress on indoor environmental health in schools. Attendees will include non-governmental organizations, school district representatives with established, sustainable IAQ management programs, industry leaders, government agencies (federal and state level), and community-based asthma coalitions focused on schools and/or healthy indoor environments.

EPA will maintain the SHIELD Network and arrange for a gathering/meeting of the Network. The engagement of the Network prior to the meeting will take place via webinars, conference call and email. The format of the SHEILD meeting will use a combination of presentations and group exercises. The meeting will highlight the unique and impressive set of assets and resources each stakeholder brings to the table. Committed partners will make offers of what assets they could share with the group, and also request resources they need to make their program stronger. Overall, the agenda will allow the group to develop ways in which they can align with one another through their collective assets.

Deliverables:

8.1 Maintenance and Support of SHIELD Network

Per a technical direction, the contractor shall develop a SHIELD Network outreach campaign strategy, planning documents and schedule. Information included in the outreach campaign strategy shall include email updates, webinars and key next steps regarding SHIELD Working Groups for Master Class, Bold Goal Development, Pacing Events and Awards.

8.2 Pre-Meeting Activities

Per a technical direction, the contractor shall develop and distribute promotional materials to key stakeholders through the Agency's High Road email system. Design and develop meeting materials, including the event agenda and presentation templates. The support contractor shall select, invite and equip speakers with the necessary information to effectively participate in this meeting. The contractor may support travel for up to two expert speakers. In close collaboration with EPA, the contractor shall identify key stakeholders to actively participate in the meeting, create invitations, manage RSVPs, and develop other on-site meeting materials (e.g., name badges and table tents). The contractor shall disseminate information through EPA's web site and other communication channels (e.g., discussion forums, email discussion forum, etc).

8.3 On-site Event Support

The contractor shall provide on-site meeting support which may include checking in speakers and participants, handing out materials, coordinating with the AV staff, and helping with other meeting related issues as they arise.

8.4 Post-event Activities

In order to build on the momentum of the meeting, the contractor shall provide support for any follow up activities after the meeting has occurred. This will include such things as support in developing email campaigns, revising and finalizing action guides and consolidating meeting evaluation feedback.

Task 9. DELIVERABLE INFORMATION

The contractor shall provide the EPA WAM with a master and an archive copy of all deliverables and drafts. Associated disks compatible with the Office of Radiation and Indoor Air (ORIA) equipment (M.S. Word for basic reports and documents and web site content) must also be provided upon completion of the work assignment.

Task no.	Deliverable	Due Date
<u>Task 1</u> Work Plan and Cost Proposal	Develop work plan and cost proposal	Within 20 calendar days of the effective date of the work assignment
<u>Task 2</u> Management Meetings	Initial Meeting with EPA WAM	Within 5 working days after approval of W.A. by EPA WAM
	Meetings and Meeting Notes	Ongoing Notes within 5 working days of meeting
<u>Task 3</u> Product Development	Provide first draft of materials	Within 20 working days of receiving TD from EPA WAM
	Incorporate EPA WAM comments	Within 10 working days of receiving feedback from EPA WAM
	Develop and submit final product	Within 10 working days of receiving comments from EPA WAM
<u>Task 4</u> Provide Support for Mentors	Secure mentors for participation in outreach opportunities to engage Schools Network	Upon receiving TD from EPA WAM
	Manage mentor opportunity calendar and timeline for communications	Provide status updates on a weekly basis
	Secure logistics for mentors participating in outreach campaigns or pacing events	Within 5 working days of receiving TD from EPA WAM

Task no.	Deliverable	Due Date
Task 5 <i>Indoor Air Quality Tools for Schools</i> Action Learning Network (ALN) Support	Develop outreach strategies for ALN various communication mediums: webinars, informational emails, and listserv	Within 10 working days of receiving TD from EPA WAM
	Implement outreach strategies	Upon receipt of final approval from EPA WAM and 5 working days from receipt of TD
Task 6 Indoor Air Quality Tools for Schools Meeting Support	Coordinate logistics for EPA-designated events	Within 10 working days of receiving TD from EPA WAM
	Secure arrangements for expert speakers for events and determine their logistical arrangements	Within 5 working days of receiving TD from EPA WAM
	Deliver report outlining expert speaker's role and presentation materials associated with event	Within 10 working days before speaker's participation in EPA-designated event
Task 7 Evaluation and Analytics Reports for IAQ Tools for School Guidance and Brand	Deliver regular updates of evaluation results and status of efforts from each phase of the evaluation	Quarterly basis
Task 8 Supporting School Health and Indoor Environments Leadership Development	Coordinate logistics for SHIELD Summit prior to the event.	Within 10 working days of receiving TD from EPA WAM
	The Contractor shall provide on-site meeting support	Within 10 working days of receiving TD from EPA WAM
	Conduct post event activities approved by EPA WAM	Within 10 working days of receiving TD from EPA WAM
Task 9	Master and an archive copy of all deliverables and drafts	December 31, 2014